

Lead Qualification & Estimate Checklist

A practical method by Tony Beal | October 5, 2026

Use this before buying more leads or adding automatic follow-up. The checklist helps a business define one useful handoff and review the facts required for an estimate. It is a proposed working method, not measured customer or revenue results.

1. Confirm the inquiry

- Record source, received time and a unique request reference. Keep labeled internal tests separate from customer totals.
- Capture the project type, city or service area, known scope and preferred contact method. Confirm contact eligibility before any outreach.
- Identify missing facts as unknown. Do not infer budget, ownership, measurements, availability or permission from an AI draft.

2. Assign the next step

- Name one accountable person. Record status, next action and due date in the system the team already uses.
- Check that the submitted reference matches the stored record and notification. An accepted form is not proof of delivery.
- Confirm that a stopped, invalid or opted-out contact cannot enter a sending queue. Human review comes before an external message.

3. Verify the complete handoff

- Use an authorized, clearly labeled test to observe storage, receipt, owner notification and next-action tracking.
- Test missing fields, delivery failure and duplicate submission. Record what actually happened and any unresolved limitation.
- Keep customer details in the private system. Publish only approved, non-identifying examples and evidence.

Further guidance: [AI-assisted sales for contractors](#) | [FieldKnown company facts](#)

Compare Estimates by Scope

A planning worksheet, not a price schedule or an approved quote

4. Define the work before the price

- List quantities or measurements, materials and selections, demolition, site access, trade work and cleanup.
- Separate fixed scope from allowances, exclusions and unknown existing conditions. Define how a change is approved and priced.
- Confirm the authority for the project address and current permit or inspection requirements. Record who handles each responsibility.
- Ask the contractor to confirm schedule, availability and the written estimate for the actual property.

5. Compare like with like

- Place each estimate against the same scope, materials, removal, disposal and permit responsibilities. A lower number may exclude work.
- Treat unsourced online numbers as illustrative planning examples. They are not verified local averages, historical job prices or a commitment.
- Confirm the responsible business and project contact. For All-Pro, contact Bill Session through the official estimate path. Tony supports the website and inquiry systems.

6. Measure the business result

- Choose a dated baseline: eligible inquiries, first reviewed response, estimates with a next action, booked conversations and won jobs.
- Separate observed results from intentions, prototypes and internal tests. Count unknown values as unknown.
- Review the workflow before increasing promotion. Fix a broken handoff before generating additional demand.

Official project inquiry: [All-Pro written estimate](#). Permit guidance: [Belleville building department](#). Requirements are confirmed by the authority for the actual address.

Discuss the business workflow: [TonyBeal.net/work-with-tony](https://tonybeal.net/work-with-tony). No ranking, citation, lead volume or revenue outcome is guaranteed.